

The Value of Continuity

Navigating complexity is not a challenge for **The Magellan Group** at Morgan Stanley Private Wealth Management.

Ferdinand Magellan knew how to navigate, using his legendary skills to lead the first seafaring crew to circumvent the globe. He possessed the courage, perseverance, and discipline to remain committed to his plan, secure in knowing that if he trusted his mapping skills, his goals and objectives would become manifest. “Like Magellan, our team’s value proposition is rooted in discovery and navigating our clients through typically complex financial decisions,” says Richard Zinman, Managing Director, Private Wealth Advisor.

For clients of The Magellan Group at Morgan Stanley, continuity matters. Simply being an experienced and highly capable private wealth management team for high-net-worth individuals, their families, and related entities isn’t enough. Clients need to know that their wealth is being managed by

a first-class team of advisors that have their eyes locked on the far horizon of financial security, steady growth, and long-term stability.

“Complexity is inevitable when dealing with multi-generational wealth. No two clients’ needs are ever the same, and those needs will change over time. The Magellan Group is purpose-built to cater to the challenges. Continuity of advice should not be complex,” says Griffin McQuilling, Senior Vice President, Private Wealth Advisor.

Charting a Long-Term Course

From their offices in Morgan Stanley’s global headquarters in New York City, The Magellan Group is one of the largest and most comprehensive teams within Morgan Stanley Private Wealth Management—combining their expertise to serve some of the most successful

and astute individuals, families, and family offices. With over 40 years of experience¹ between Magellan’s advisors, they provide holistic coverage including but not limited to: investment management; trust, tax, and estate planning strategies; liability management; and philanthropic advisory.

“Unlike traditional wealth management teams, we do not lead with investments. It is only after we formulate an efficient tax, trust, and estate strategy, in concert with our clients’ tax and legal advisors, that we dive into our investment philosophy—which is guided by the principles of the Yale Endowment Model,” says Joseph Dunn, CFP®, First Vice President, Investment Consultant.

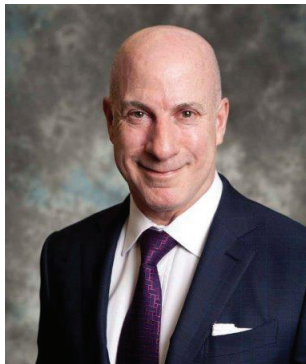
As new generations begin to take charge of family wealth, The Magellan Group is ready to deliver an even higher standard of advice and service. Leveraging the deep resources

of one of the world’s premier financial institutions, the team is positioned to provide clients with the essential continuity for helping to meet their personal, financial, and legacy goals and objectives.

“Continuity is key,” says Matthew De Vito, Business Development Director. “We relish the opportunity to develop relationships with different generations in our clients’ families. Part of our job is to help make sure that there’s a strategy in place for managing those transitions. We plan to provide the exceptional level of experience, resources, and personalized service that have served our clients for decades.”

“It begins and ends with trust. Our clients trust our unique and consistent approach to wealth management. We are tireless advocates for our clients and will always lead with exceptional ideas. The Magellan Group has the right mix of intellectual curiosity and diversity of opinion to navigate any level of complexity,” says Zinman.

¹Zinman (1983), McQuilling (2015)



LEFT: Richard Zinman, Managing Director, Private Wealth Advisor. **RIGHT** (from left to right): Joseph Dunn, CFP®, First Vice President, Investment Consultant; Matthew De Vito, Business Development Director; and Griffin McQuilling, Senior Vice President, Private Wealth Advisor.

Morgan Stanley

The Magellan Group at
Morgan Stanley Private
Wealth Management
1585 Broadway, 21st Floor
New York, NY 10036
212-761-5261

[advisor.morganstanley.com/
the-magellan-group](https://advisor.morganstanley.com/the-magellan-group)

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